**Polity, Records, and You**

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**PHS is the back office for mid councils**

We bring in runs of ministers’ personnel records, congregational vertical files, permanent judicial commission records, investigating commission records, administrative commission records. Email David for advice: [dstaniunas@history.pcusa.org](mailto:dstaniunas@history.pcusa.org)

**Closing church office**

You will run into unexpected stuff; make piles – what do you use actively, what is not active but permanent; disposition of material PHS won’t take; records of antecedents; records housed at UPSem Richmond; deceased ministers files can come to PHS; you can digitize some stuff yourself; digitize for access, only scan what you need;

Does anybody encrypt PDFs?

Distinguish between active born-digital records and inactive; prepare for transition, export from current software / databases, have an off-ramp; some folks have laboriously redacted SSNs from 5-part files for data security reasons.

**Standing up digital-first office**

Futureproof your physical office, the time to move is likely to come; Office 365 / OneDrive; ministers folders; congregation folders; only maintaining active records; write meaningful folder titles;

Personnel records of ministers, candidates, and inquirers are permanent. Adverse finding / adverse inference at trial if you can’t produce records when you have a reasonable belief that they would be sought out in litigation ([e.g.](https://www.xperthr.com/news/employers-sanctioned-by-federal-courts-for-destroying-records/9664/)); have an established records retention schedule. Treat CREs and CLPs like ministers, fulfilling the same functions.

ICs and PJCs are welcome here. Laurie Griffith can weigh in on some new OGA guidelines for maintaining judicial records.

Helpful to make your own inventory for personnel records; we do box-level description of mid council records; we do item level records for congregations

**Dismissing churches**

Ten years ago various presbyteries put out “gracious dismissal” policies with departing churches letting them leave with their original records in their hands. G-3.0107 says that when a council is no longer of the PC(USA), records belong to the next highest governing body. This got clarified in a GAPJC decision known as McGee: <https://oga.pcusa.org/site_media/media/uploads/oga/pdf/pjc221-08.pdf>

Records are the ongoing responsibility of presbytery, not just property to be disposed of. Dismissal conditions should include getting the complete run of session minutes and registers into the hands of the presbytery – PHS of course will bring those in on deposit.

**Experience with legal discovery / insurance / Boy Scouts**

Ministers under criminal indictment; possible objections to buildings / property sales; Syn So Atlantic requires legal description of any property sold – “an adjacent lot” is a problem; subpoena will trump an informal seal; sealed until they’re not;

Recent changes to retention period for insurance records. Transaction or occurrence policy vs claims-made policy:

The two types of policies are “claims made” or “transaction or occurrence” during the policy period. For the first, the claim must be received during the policy coverage period. For the latter, a claim may be made even after the policy is no longer current if the transaction or occurrence that caused the claim happened during the policy period. This most often comes up with injuries or diseases that have a long latency period like asbestosis. Arguably the injury occurred with when the asbestosis was inhaled but the symptoms do not develop until years or even decades later. This is the main reason for the switch in policy type -- most now are claims made. When the policy period ends, the insurer knows what claims have been made and will not be notified many years later of a potential liability. Both of these can be general or comprehensive liability policies.

More and more congregations are copying policies into the minutes as a stopgap

**More topics**

Challenges of p/t work (10 hours); Cherokee Pby set up a team for a week to plow through material. (In a real pickle, or for presbyteries near Philadelphia, PHS staff have made site visits to clear out records. David has done this for New York, Newark, Pittsburgh, and Giddings-Lovejoy. [dstaniunas@history.pcusa.org](mailto:dstaniunas@history.pcusa.org))

Correspondence! Share important emails with your successor. Folder up emails about topics of ongoing interest / hotness / sensitivity. A couple emails at a time? Easiest preservation strategy is to just forward them. Anything more than like five emails? Export a whole folder of emails;

for Gmail use Google Takeout, following these instructions (<https://webapps.stackexchange.com/a/150733>)

for Outlook (app or webmail) export to a .pst file:

<https://support.microsoft.com/en-us/office/back-up-your-email-e5845b0b-1aeb-424f-924c-aa1c33b18833#:~:text=Select%20File%20%3E%20Open%20%26%20Export%20%3E,back%20up%20and%20select%20Next>.

Take a look at struggling congregations, take an opportunity to preserve records when you have it. Square away presbytery minutes first. Communicate with congregations about their records (David is available for trainings)

Camp & conference center records

Recent changes to camp and conference center retention! Records of minors’ involvement in camp programs are permanent. Advice from the American Camp Association is here: <https://www.acacamps.org/download/record-retention-guidelines>